

# SchoolMint Enroll Basics for Migrating Customers



# Agenda

- Environments
- Settings
  - Schools/Programs
  - Users
  - Forms
  - Rules Engine
  - Lottery
  - Communications/Workflow
  - Notifications
  - Boundaries
  - Sync Service

# SchoolMint Enroll Environments:

## Production Environment:

Admin Login: <https://{domain}.schoolmint.com/manage>

Family Login: <https://{domain}.schoolmint.com>

- Real site with real data
- Share with families
- Changes made to this site will remain

## Testing (Sandbox) Environment:

Admin Login: <https://{domain}.Sandbox.schoolmint.com/manage>

Family Login: <https://{domain}.Sandbox.schoolmint.com>

- Copy of production site (a copy of the real data)
- Used for testing purposes
- **DO NOT** share with families
- Changes made to this site will remain temporarily
- Sandbox site refresh happens every 2 weeks on Sundays

 This is a **sandbox** environment for internal use only.

# Schools/Programs



# School Groups

This is the highest level of organization for a group of schools. This is used for an organization as well as for SIS connections (different SIS connections can be tied to different school groups).

Additionally, the school group will house the district's boundary and re-registration rule.

## School Groups

Add, edit, and delete schools groups for use within the system.

  
**Oak School District**  
Code: 1

  
Add a School Group

School District



School Group



Preschool Elementary Middle High

School Levels

# School Levels

This is a categorization of the school to define the grade levels offered. For example, elementary, middle, and high school are all different school levels.

For registration / re-registration, school levels also allow us to set the default start and end dates that determine how long the form is available for ALL schools assigned to this level.

School Group

School District



Preschool

Elementary

Middle

High

School Levels

## Elementary School: Edit

Cancel

Save Level

### Level Information

Level Name \*

Elementary School

Minimum Grade \*

1

Maximum Grade \*

6

### Registration Dates

Start Date

12/01/2024 03:30 PM



Central Time

End Date

03/05/2025 03:30 PM



Central Time

### Re-Registration Dates

Start Date



Central Time

End Date



Central Time

# Grades

Grades are configured to be used for applications and registrations. Default grade information is preloaded into Enroll for grades from PK-12, but these can be removed/modified, and new custom grades can be created.

Additionally, you can set age/grade restrictions and cutoffs.

Manage Schools & Programs: 2024-2025

General  
Add, edit, and delete schools & programs used in the system.

Schools/Programs  
Date & Time  
Manage Users  
Manage Lotteries  
Contents/Letters  
Custom Data  
Forms

Manage School Groups > Manage Grades >  
Manage School Levels > Manage Schools >

Manage Schools & Programs: 2024-2025

General  
Add, edit, and delete school/program grades.

Schools/Programs  
Date & Time  
Manage Users  
Manage Lotteries

Numeric	Grade	Birthdate Range	Ignore Age Range	Flag Year O
5	5	09/01/2013 - 09/02/2014	N	N

Grades: Add New

Cancel Save Grade

Information

Numeric \*  
Grade \*  
Max 25 Characters

Enforce Age Grade Cutoff

Restrict for Students Born Before \*  
Restrict for Students Born After \*

Allow Year Buffer Before  
Allows parents to continue if birthdate is up to a year BEFORE the valid range above, and throws flag for admin verification

Allow Year Buffer After  
Allows parents to continue if birthdate is up to a year AFTER the valid range above, and throws flag for admin verification

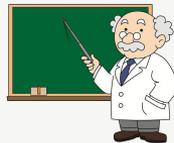
# Schools vs. Programs

Schools are the brick and mortar buildings that students will **register to attend**.

Programs are housed within a school. Programs are where students will **apply and be run through a lottery**.

There can be many programs at one school - OR - a single program for all students.

## STEM Program



## Dual Language



## Performing Arts



# Program Categories

Program categories define the type of program (e.g., Dual Language, Magnet, International Baccalaureate(IB)).

This allows you to set application start / end dates for all programs within a category. Advanced application settings are available, such as: limits by category, limits by school, and admin-only categories.

## District Schools: [Edit](#)

Cancel

Save Category

### Category Information

Category Name \*  
District Schools

Maximum Program Choices per Category \*  
1

Maximum Program Choices per Category per Scho...  
1

### Application Dates

Start Date  
10/01/2024 11:31 AM

Central Time

End Date  
12/23/2025 11:30 AM

Central Time

### Options

Allow Applications to be Ranked

# Users



# User Groups and Permissions

The Users area is where you will manage all user accounts that have access to Enroll, whether it is a guardian or admin user.

Manage Users allows us to set up admin user groups and their permissions, invite new admin users, review parent users, and track login attempts to the system.

The screenshot displays the 'Manage Users' interface. It features a grid of navigation cards: 'User Groups & Permissions', 'Admin Accounts', 'Guardian Accounts', 'Login Attempts', and 'Deactivated Accounts'. A 'Module Access' pop-up window is open, showing a list of permissions categorized by Applications, Flags, and Lottery.

Module Access	
<b>Applications</b>	<b>Flags</b>
<input checked="" type="checkbox"/> View Applications	<input checked="" type="checkbox"/> Dismiss Flags
<input checked="" type="checkbox"/> Edit Applications	
<input checked="" type="checkbox"/> Delete Applications	<b>Lottery</b>
<input checked="" type="checkbox"/> Withdraw Applications	<input checked="" type="checkbox"/> Run Lotteries
<input checked="" type="checkbox"/> Update Eligibility Status	<input checked="" type="checkbox"/> Manage Cutoff Numbers
<input type="checkbox"/> View Only Ranking	<input checked="" type="checkbox"/> View Lottery Dashboard
	<input checked="" type="checkbox"/> Delete Lotteries

# Forms



# Forms

Form processes contain the steps guardians go through to complete a form.

Ex: Application Form Process

- Student Information
- Guardian Information
- Program Selection
- Ranking
- Siblings
- Signature

The form process is equivalent to a packet of forms in the SchoolMint Enrollment system.

The screenshot displays the 'Open Enrollment Application: 2024-2025' interface. At the top, there is a navigation bar with 'Dashboard', 'Messages', 'Select Language', 'Mariana Ca...', and '2024-2025'. Below this, the title '< Open Enrollment Application: 2024-2025' is shown. A progress indicator on the left lists eight steps: 1. Student Inform... (checked), 2. Guardian Infor... (checked), 3. Program Selecti... (checked), 4. Rank Choices (checked), 5. Siblings (warning icon), 6. Elementary School... (unchecked), 7. Signatures (unchecked), and 8. Review and Send (unchecked). The 'Student Information' section is active, showing a progress of 1/8. It includes input fields for First Name\* (Claire), Middle Name, Last Name\* (Jones), Birthdate (MM\* 11, DD\* 11, YYYY\* 2012), and Gender (Female selected, Male and Nonbinary unselected).

# Student Information Form

The Student Information Form is the first set of questions parents are presented with, and this ultimately creates the student's profile within Enroll.

Usually, the data collected in the Student Information form helps to drive the logic for eligibility rules which presents the appropriate forms for parents to select.

This form is meant to be short and gather only the needed information for the student's account.

The screenshot shows a mobile application interface for the 'Student Information' form for the 2024-2025 school year. The form is titled 'Student Information: 2024-2025' and includes the following fields:

- First Name\***: Claire
- Last Name\***: Jones
- Date of Birth**: MM (11), DD (11), YYYY (2012)
- Grade Entering\***: 5
- Student Home Address**: 35 Jefferson Street
- Student Home Address 2**: (Empty)
- Student Home Address City**: Lafayette
- Student Home Address State**: LA

At the bottom of the form, there are two buttons: 'Cancel' and 'Confirm'.

# Applications vs. Registration



Applications are meant to collect the necessary information to determine if a student qualifies for a program's lottery. Guardians can complete multiple applications to various schools/programs per your policy.

Registrations are meant to collect all of the necessary information to get the student enrolled in the school/district. **Guardians are only able to complete one registration form per year**, as the student can only physically attend one school. Typically, the registration is completed for the lottery offered/accepted school.



# Re-Registration

Re-Registration (known as re-enrollment in the SchoolMint Enrollment system) is completed by students returning to the same school/district. The rules for re-registration can be configured to allow the appropriate students to complete the form.

Typically, the re-registration form is substantially shorter than the registration forms, as the district/school already has much of the needed information.

Get  
Re-enrolling!

# Rules Engine



# Program Eligibility Rules

Program eligibility rules drive which programs are displayed for applicants to select when completing the application.

Eligibility rules can be set program-by-program to ensure the appropriate students are being considered for the lottery.

Chestnut MS Open Enrollment: [Edit](#)

PROGRAM INFORMA...   PROGRAM ELIGIBILITY   APPLICATION SETTI...   LOTTERY SETTINGS

Eligibility Rule/Restriction  
In District

## Common Program Eligibility Rules:



Address  
Restrictions



Current  
Students



Previous  
School



Previous  
Classes

# Registration Eligibility Rules

Registration rules are what tell the system which students are eligible to register for specific schools.

Rules for *new* registrations:

- are assigned in School settings
- can vary school to school
- can incorporate multiple rules to ensure students see the appropriate options

Registration Rule: [Edit](#)

#### Rule Information

Rule Name \*

Registration Rule

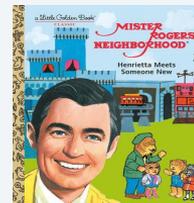
Rule Description:

Only students in Accepted status may register at a school that has this rule assigned.

## Common Registration Eligibility Rules:



Lottery Accepted



Neighborhood School

# Re-Registration Eligibility Rules

Re-registration rules are what tell the system which schools the students are eligible to re-register into.

Rules for re-registrations will be set in the School Group settings, and can incorporate multiple nested rules to ensure students see the appropriate options. **Only ONE re-registration rule can be used per school group.**

Re-register in Current School: Cancel Save Rule

Edit

Rule Information

Rule Name \*  
Re-register in Current School

Rule Description:  
Students may only re-register in the school that is selected as their current school.

Student is eligible if  ANY  ALL of the conditions below are met

Operator

Student School IS  Same School

Add Condition Add Nested Group

Cancel Save Rule

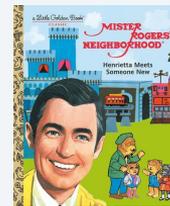
## Common Re-registration Eligibility Rules:



Feeder Pattern



Return to Same School



Neighborhood School

# Flags

Flags are used as an **automated alert** that an application or registration may need further review. Several types of flags are available by default, and you can add custom flags if needed.

- Flags are displayed on the application and registration pages when triggered.
- Flags needing review are red.
- Flags that have been dismissed are grey.
- A count of flags that have not been dismissed is visible next to the flag.

	App#	Full Name
1 	666974	Apple, Red
	1072698	Frame, Tony
1 	1074050	Marquez, Dora

## Application Flags

 **Marquez, Dora** Birthdate: 03/15/2007 Grade: 10 Guardian(s): 1211578: Emily Carlson

Program: Sycamore HS Musical Arts

Date/Time	Flag Message	Dismissed By	Dismissed
01/22/2025 12:58:34 PM	<b>Reg Not Started</b> <i>Student is offered + accepted on lottery, but has not yet started registration</i>		<input type="checkbox"/>

Cancel

Save Flags

# Standard/Common Flags

## Standard Flags:

- Age Verification
- Duplicate Student Detected
- Ineligible Due to Changes
- Possible Duplicate Student
- Non-Validated Address
- Student is a Multiple

## Common Custom Flags:

- Sibling Attending
- Sibling Applying
- Present/Missing Upload
- Employee Child
- Out of District/School Zone
- Same Current/Applying Grade
- IEP/504/Special Services
- Military/Veteran
- Language Preference

# Lottery



# Lottery

Lotteries are directly tied to applications. There are varying levels of settings to configure a lottery (can be set globally or program by program).

Priorities within the lottery designs can be set automatically (using the rules engine to drive the logic) or set manually. Admins can choose for automatic priorities to be available for override.

Once the lottery design(s) have been configured, we **strongly** encourage admins to test many scenarios related to the lottery.

## Select Lottery Type

And add sub-lotteries and priorities to create a lottery design

Tiered (Entries) Lottery

Weighted Lottery

1

### Sub-Lottery: 1

Select one or more priorities

Sibling Attending Any School in the Organization

Weight  
5

Add Quota

OR

Select one or more priorities

Employee Child

Weight  
3

Add Quota

OR

Select one or more priorities

IEP

Weight  
2

Add Quota

Add a Priority Group

Guaranteed Placement  Make Weights Cumulative

Sort by Score

2

### Sub-Lottery: 2

Select one or more priorities

In District

Weight  
1

Add Quota

Grade: 1

### General Lottery

OFFERED LIST 2 Assigned, 1 Seat(s) Available

ID#	App id	Student Name	Priority	sublottery	Status	pool	Rank	Original Rank	Manual Indicator	published	timestamp_notified
7195652	628216	Marquez, Dora	Multiple Priorities (2)	2	✓	1	1	1	0	Yes	2025-02-21 16:13:35
2439807	810622	Blues, Elwood	Multiple Priorities (3)	1	✓	1	2	2	1	Yes	2025-03-10 17:44:22

# Communications & Workflow Notifications



# Automated Notifications

## Applications:

- Application Submitted
- Application Status Updated

## Events:

- Event Confirmed
- RSVP Reminder

## Appeals:

- Appeal Received
- Appeal Approved
- Appeal Denied

## Lottery:

- Lottery Results - Offered
- Lottery Results - Waitlisted
- Lottery - Accepted Confirmation
- Lottery - Declined Confirmation
- Lottery Placement Pending
- Lottery Placement Decline Warning
- Registration Decline Warning

### Lottery Notifications to Guardians:

Accepted Placement Notification

Lottery Placement Accepted - Parent Notification

Declined Placement Notification

Lottery Placement Declined - Parent Notification

Offered Placement Notification

Lottery Results - Offered

Waiting List Notification

Lottery Results - Waiting List

## Registration:

- Registration Submitted
- Re-Registration Submitted

# Workflow Notifications

Workflow Notifications are an automated communication that can be configured to send admins, guardians, or both after a specific action or trigger is reached. This could be as simple as submitting a form or configured with more complex logic using the rules engine.

Currently, we have the ability to use workflow notifications for Applications, Registration, Appeals, and SchoolFinder.

This allows admins to automate messages outside of the automations on the previous slide.

The screenshot shows a configuration interface for a workflow notification titled "Guardian 1 phone changed: Edit". At the top right are "Cancel" and "Save Notification" buttons. Below the title, it says "This Workflow Notification is For:" followed by a dropdown menu set to "Applications".

The "Primary Settings:" section includes:

- "Workflow Notification Name \*": Guardian 1 phone changed
- "Description": Guardian 1 phone changed (with a "231 characters remaining" indicator)
- "Notification Trigger \*": Select a Notification Trigger \* (dropdown menu set to "Custom Trigger")

The "Custom Trigger:" section shows a logic rule:

- "If" section with radio buttons for "ANY" and "ALL" (the "ALL" button is selected).
- Text: "of the conditions below are met"
- A condition row: "Select Field" dropdown set to "student\_annual\_guardian1\_phone", followed by "Has Changed" and a close button (X).
- Buttons at the bottom: "Add Condition" and "Add Nested Group".

# Boundaries



# Boundaries/KMLs

The screenshot displays the 'BOUNDARIES/KMLs' interface. At the top, there are three tabs: 'BOUNDARY LIST', 'MAP VIEW', and 'IMPORT BOUNDARIES'. Below the tabs, a green notification bar states 'This address is within an existing boundary.' The main area is split into two panels. The left panel shows a map with a search address '317 Jefferson Street' and a red pin. The right panel shows a 'Boundary List' table with columns for 'Boundary' and 'Boundary Type'. The table lists 'Lafayette Test Boundary' (District Boundary) and 'Dogwood ES' (School Zone). A tooltip above the table reads 'Hover over a boundary name to highlight the boundary on the map.'

Boundary	Boundary Type	Details
Lafayette Test Boundary	District Boundary	Details
Dogwood ES	School Zone	Details

Boundaries can be added to Enroll to identify the neighborhood/attendance zoned school for a student, or whether a student is applying from inside or outside of the district. All boundary files must be in KML format.

Boundaries can be used to set-up rules in relation to schools and/or programs, priorities within the lottery, form step logic, and identifiers, such as flags.

# Sync Service



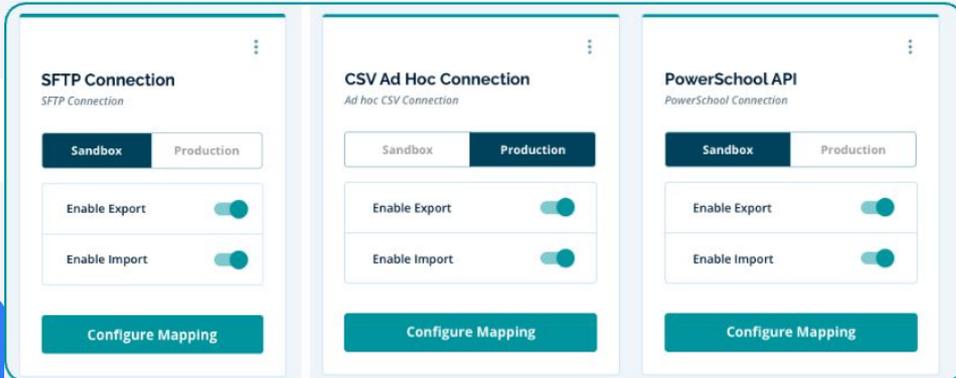
# Sync Service Options

## Sync Options:

- Ad Hoc/CSV
- SFTP
- API
  - Powerschool
  - Skyward Q
  - Aeries

## Available Export Options:

- Student Data

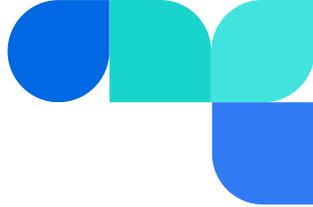


## Available Import Actions:

- Student Data
- Admin Users
- Schools/Programs
- Cut-off Numbers
- Seat Tracker
- Applications

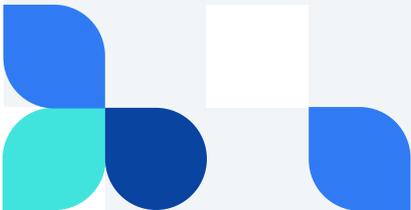
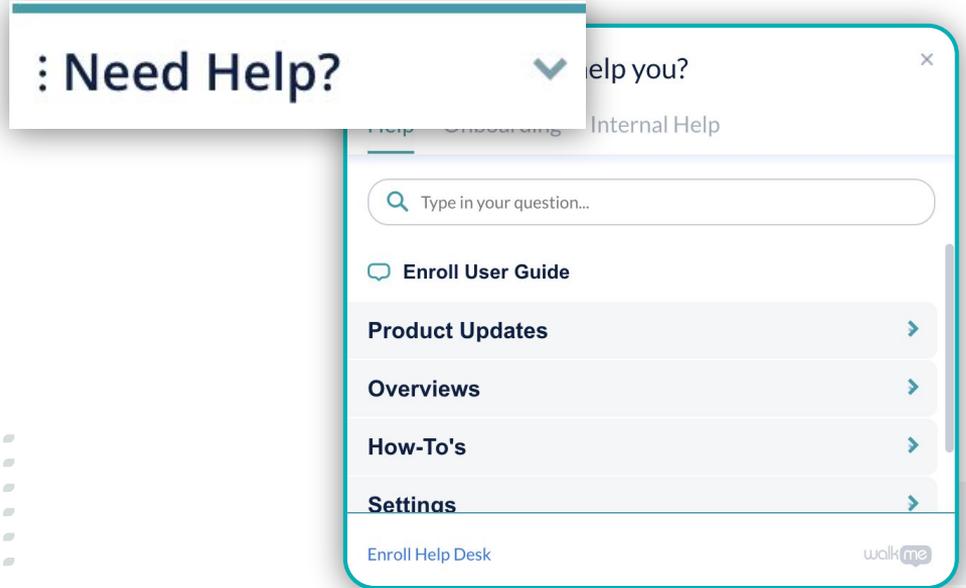
# Help Resources





Use SchoolMint Enroll's Walk Me tool to get quick access to help articles, and site walk throughs!

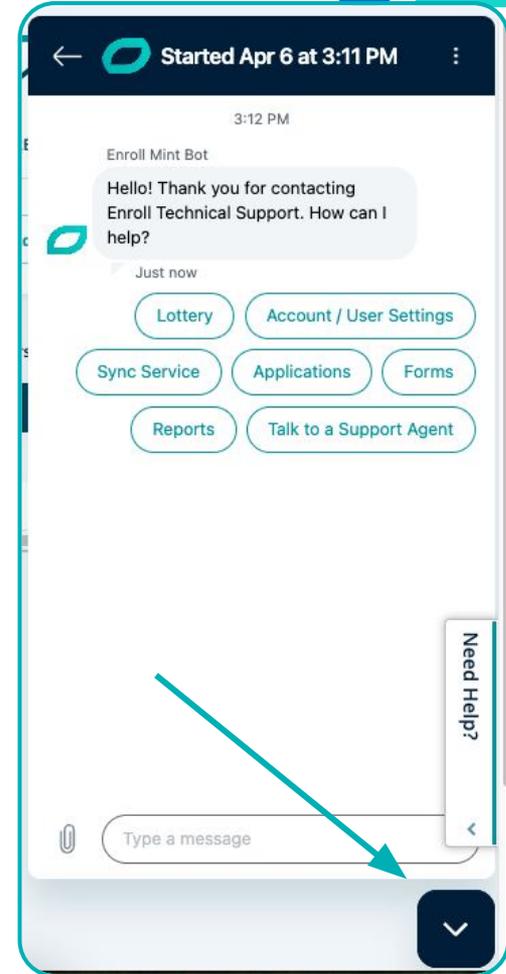
# Walk Me



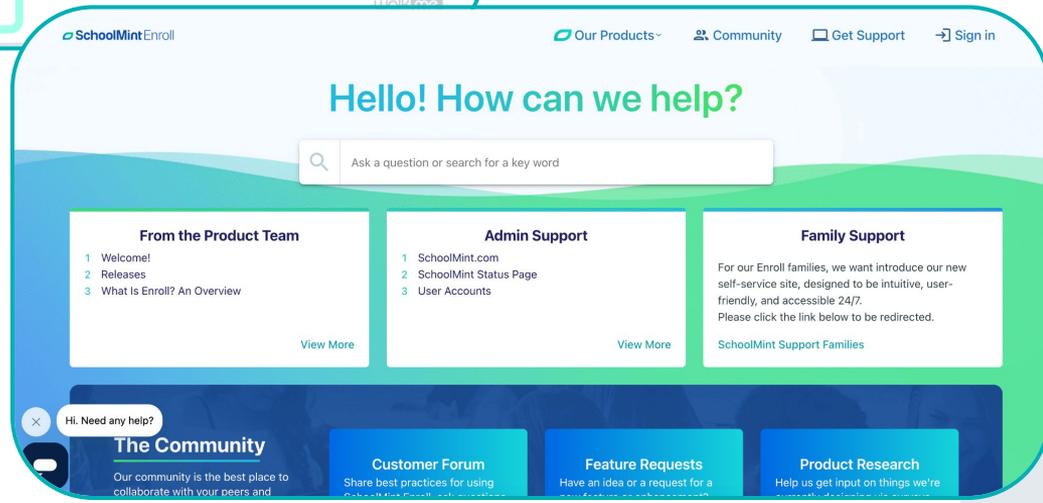
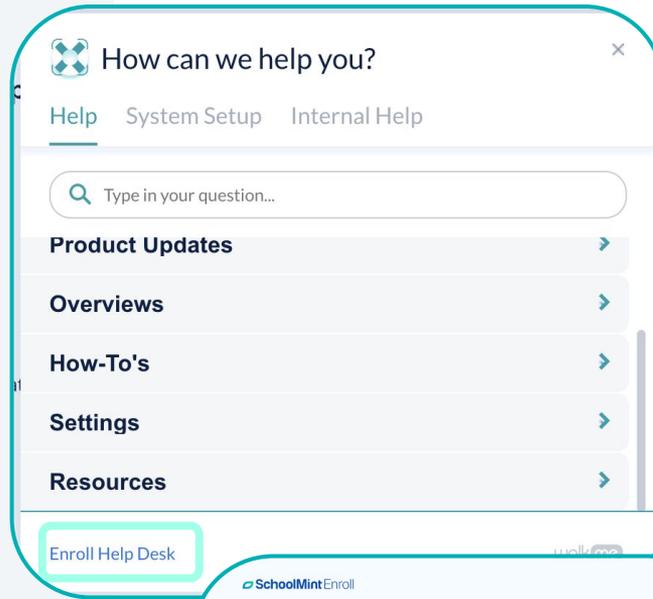
# Chat



Use the icon in the bottom corner of every page in Enroll to surface our Chat feature to access quick how-to answers or to connect with a Technical Support agent.



# Zendesk Help Center



A smiling woman with curly hair, wearing a patterned top, stands in a classroom. In the background, several students are seated at desks, some looking towards the camera. The image has a blue and green color overlay.

—  
**Thank You!**

